Call Center QRG

Agent Tasks

Call Center Interface

The following elements are available from the Call Center interface:

- **Menu** bar – Located at the top, it allows you to set up your preferences for using the Call Center.
- **Call Selector** list – Located below the Menu bar, lists current calls.
- **ACD/Control** panel – Located below the *Call Selector* box,
  allows you to:
    - Modify your availability state (*Availability* combo-button including Available, Unavailable, and Wrap-Up states)
    - Manage calls (Dial, Answer, Transfer, Conference, End, Escalate buttons)
- **Content** panel – Is where directories appear.

Agent ACD States

Your ACD state can be one of the following:

Available – You are available to receive calls.

Unavailable – You are not available to receive calls.

Wrap-Up – You are wrapping-up a call and temporarily unavailable to receive calls.

Configure Your Sign-in ACD State

You can set your ACD availability state. This is your state upon signing in.

1. On the *Menu* bar, click **Tools** and then **Options**.

2. Click the **Agent** tab.
3. Set the *Agent post sign-in ACD state* to "Available" or "Unavailable".
4. Set your *Agent post call* ACD state to "Wrap-Up", "Available", or "Unavailable".
5. If you set your post call state to "Wrap-Up", select the *Agent timed Wrap-Up* box and select the length of time before your status changes to "Available" upon the completion of a call.

Change Your ACD State

 To change your availability state, click the **Availability** button and select your new state from the drop-down list (Available, Unavailable, or Wrap-Up**)**.

Dial from Directory

1. In the *Content* panel, select the target directory.
2. Click the phone number you want to call.

Dial Ad Hoc Number

1. Click **Dial**
2. Select the number from the number pad.

Alternatively, in the *Dial Number* box, type the number to call and press **Enter.**

Dial from Search

1. In the *Content* panel, select the target directory. In the *Search* box, next to the *Call Selector* box, type your search criteria . Press **Enter**.
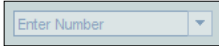Click the phone number you want to dial.

Dial from Call History

1. From the Menu bar, select Tools – Call History. Select the call history you want (Dialed Calls, Received Calls, or Missed Calls).
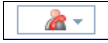Click the phone number you want to call.

Redial Number

Up to 10 previously dialed numbers are available.

1. Click the arrow at the right of the *Dial Number* box .
2. From the *Dial Number* list, select the number you want to call.
3. Press **Enter**.

Answer Call

Calls can be answered automatically or manually.

To answer calls automatically:

- From the *Status* bar, select [icon] and check *Auto Answer*.
  The manual mode appears.

NOTE: This feature works only if your device is Advanced Call Control (ACC)-compliant.

To answer a call manually:

1. From the *Call Selector* list, select an incoming call.
2. Click **Answer.**

Blind Transfer Call

Calls can be blind transferred while active, held, or ringing (in) on your phone.

1. From the Call Selector list, select the call to transfer.
2. Dial or select the number to call. The first call is put on hold.
3. Before the second call is answered, click Transfer and select the phone number from the list.

Transfer Call with Consultation

Calls can be transferred with consultation while active, held, or ringing (in) on your phone.

1. From the Call Selector list, select the call to transfer.
2. Dial or select the destination number. The first call is put on hold. When the second call is answered, speak to the party.

3. Click Transfer and select the phone number from the list.

Transfer Call to Queue

- While on a call, click **Transfer** and select the destination queue from the list.

Hold Call

This function is not available from a remote office.

1. From the *Call Selector* list, select an active call.
2. Click **Hold**.

Unhold Call

This function is not available from a remote office.

1. From the *Call Selector* list, select a held call.
2. Click **Unhold**.

End Call

1. From the *Call Selector* list, select the call to end.
2. Click **End.**

Start Conference

1. While on a call, dial a number or select a contact.
2. Click Conference and select Start from the list.

Hold Conference

To hold a conference, click **Conference** and select *Hold*. The other parties can continue their conversation.

Unhold Conference

To unhold a held conference, click **Conference** and select *Unhold*.

Leave Conference

To leave a conference, click **Conference** and select *Leave*.

Drop Call from Conference

To drop a selected call from a conference:

1. In the Call Selector list, select the call you want to drop.
2. Click **End**.

End Conference

To end a conference, click **Conference** and select *End* from the list.

Blind Escalate Call

To blind escalate a call to a supervisor:

1. While on the call, click **Escalate** and select the supervisor's name from the list.
2. Click **Transfer**, before the call is answered.

Escalate Call with Conference

To conference a supervisor into a conference:

1. While on the call, click **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Conference** and select Start from the list.
4. To leave the conference, click **Conference** and select Leave.

Escalate Call with Hand Over

Use this method to escalate a call to a supervisor through a conference call and then leave the call.

1. While on the call, click **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.

3. Click Conference and select Start from the list.
4. When the conference is established, click Conference and select Leave.

Escalate Call with Individual Mid-Conference Hold

5. While on the call, click Escalate and select the name of a supervisor from the list.
6. When the call is answered, consult with the supervisor.
7. Click Conference and select Start from the list.
8. To put an individual party on hold, select the party from the Call Selector list and click Hold.

Escalate Call with Mid-Conference-Hold

1. While on the call, click **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Conference** and select Start from the list.
4. To put the conference on hold, click **Conference** and select Hold. The other parties continue their conversation.

Escalate Call with Consultation

1. While on a call, click **Escalate** and select the supervisor's name from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Transfer**.

Open URL

You can open a URL page in your browser, to obtain more information about the incoming call. This page contains information about the calling party encoded in its URL.

While on a call, click the **Web Pop URL** button in the call pop-up notification window.

Save vCard

When Outlook is running, you can save the active caller's phone number and personal information as a vCard in Outlook.

While a call is active, click the Add vCard button in the call pop-up notification window.

Display Call History

From the *Menu* bar, select *Tools – Call History.*

Order Call History

To order the call history according to a column:
1. In the *Tools – Call History* dialog box, click the column header.
2. The history log is sorted in descending order.
3. Click the column header again to change the order to ascending.

Delete Call History

To delete all call logs:

In the *Call History* tab, click **Clear All** Clear All and then confirm your action. This clears all call logs entries in Call History

To delete selected log entries:

1. In the Call History tab, select the call log you want (Dialed, Received, or Missed).
2. Select the call log entry you want to delete by clicking it.
   *To select more than one entry, hold CTRL or SHIFT keys while doing it, or, to select all calls in this log, click **Select All*** Select All .
3. Click **Clear**, and then confirm your action. The selected calls in the selected call logs are cleared.

Show or Hide Directory Tab

To make a directory tab visible in the *Content* panel:

1. From the Menu bar, select **View** and then **Directories**.

2. In the Directories menu, check the directories you want to show in the *Content* panel.

Display Directory

In the *Content* panel, click the tab of the directory you want to display.

Search Directory

To search for a contact based on specific criteria:

1. In the Search box at the bottom of the Content panel, type the information you want to search on.
   Mary .

2. Click **Search** .
   The directory displays the contacts that match the search criteria.

3. To return to the unfiltered directory, click **Reset** .

Supervisor Tasks

Display Monitoring Center Activity

To display the status and statistical information about the agents and queues you manage, on the Menu bar, click *View,* and then select *Monitoring* and *Dashboard*.

To display the status information, in the *Content* panel, click the *Monitoring* tab to view the current status, or click *Dashboard* to view statistics.

Monitor Agents and Queues

You monitor agents and queues using the *Monitoring* tab.

The *Team* panel shows real-time status of the agents you supervise and allows you to change the state of an agent.

The call state of an agent can be ![available icon] available to receive a call, ![busy icon] on a call/busy, ![ringing icon] ringing, ![dnd icon] do not disturb, ![private icon] private, ![forwarding icon] forwarding always, and ![not available icon] not available.

The ACD state of an agent can be ![signing-in icon] signing-in, ![available icon] available, ![unavailable icon] unavailable, ![wrap-up icon] wrap-up, ![signed-out icon] and signed-out.

To change the ACD state of an agent, click the agent's current ACD state and select the new state from the drop-down list.

The *Call Centers* panel shows the Call Centers you are managing. You can expand the Call Centers you manage by clicking the plus icon. When expanded, the first 25 calls in the queue appear.

The call center *Status* (**Premium queues**) can be: *Night Service*, *Night Service Override*, *Holiday Service*, *Forced Forward*, or ** (none of the above).

A triangle ![triangle icon] in the *Position* column indicates a bounced call; an arrow ![arrow icon] indicates a reordered call. A loudspeaker icon in the *Caller Name* column indicates that the caller is being played an announcement.

Supervisor Barge-In

1. In the Team area of the Monitoring tab, select an agent with the status "Off Hook".
2. Click **Barge In**.
3. A conference call is established.
4. To leave the conference, click **Conference** and select Leave.
5. Alternatively, to drop a party from the conference, select the party's name from the Call Selector list and click **End**.

Agent Call Pick Up

- In the *Team* area of the Monitoring tab, select an agent with the status "Ringing" ![ringing icon]

- Click **Call Pick-Up**.
  You can now speak to the calling party.

Position Call in Queue

1. In the Monitoring tab, select a queue.
2. From the Queue Detail sub-table, select the call to reposition.
3. In the Reorder list located at the bottom-right of the tab, click the desired new position of the call ![Reorder drop-down].

NOTE: You cannot place a call ahead of a bounced call.

Retrieve Call from Queue

1. In the Monitoring tab, select a queue.
2. From the Queue Detail sub-table, select the call to answer.
3. Click **Retrieve** ![Retrieve button], at the bottom of the tab.
4. Answer the retrieved call.

Transfer Calls between Queues

1. In the Monitoring tab, select a queue.
2. From the Queue Detail sub-table, select the call to transfer.
3. From the Queue Transfer list, at the bottom of the tab, select the target queue. The call is transferred to the back of the queue ![Queue Transfer drop-down].

Retrieve Call from Queue to Number

1. In the Monitoring tab, select a queue.
2. From the Queue Detail sub-table, select the call to transfer.
3. Click **Retrieve**.
4. Dial or select the destination number.
5. Click **Transfer**.

View Agents and Queues Statistics

You can view real-time call and agent statistics, for the Call Centers and agents assigned to you, using the Dashboard tab.

- The Queue Summary shows key performance indicators for each Call Center you manage.

- The Agent Summary shows key performance indicators for the supervised team of agents.

- The Queue Summary Table shows queue statistics on a per-Call Center basis in a tabular form.

Reports

The following reports are available to you:

- Agent Activity (historical or real-time) – Provides metrics about agents call handling activities for a Call Center.

- Agent Utilization (historical) – Provides metrics related to agents call performance for a Call Center.

- Queue Performance Analysis (historical or real time) – Displays metrics related to the performance of a Call Center ACD.

- Service Level (historical) – Displays metrics related to the speed of answering ACD calls.

Display Report

1. From the Menu bar, select *View* and then *Reports*.
2. Select the report type you want.

In the dialog box that appears, enter the required information.
Click **Display**.
The report appears in the *Content* panel.

Refresh Report

Only real-time reports can be refreshed to show the most recent data.

To refresh a report, click **Refresh**.

Print or Export Report

You can print a report or export it to a file that can be opened in Excel or in a text editor.

To print a report, at the bottom of the report, click **Print**.

To export a report to a file:

1. At the bottom of the report, click **Export**.
2. Specify the location where you want to save the file.

Keyboard Shortcuts

General and Menu Bar Control Keys	
ESCAPE	Exit from the active window.
Ctrl + A	Toggle between *Available* and *Unavailable* states.
Alt + W	Change your status to *Wrap-Up*
<NumPad 0…9)	Dial digits of a phone number
Menu Bar Control Keys	
Alt + O	Display Tools – Options.
Alt + R	Display Tools – Call History.
Alt + H	Open VC3 *Call Center User Guide*.
Alt + L	Toggle between login and logout.
Alt + F4	Exit the Call Center.
F11	Toggle between full screen and compact mode for the Call Center window.
Directories Control Keys	
Alt + 1	Click the *Contact Directory* tab.
Alt + 2	Click on *Personal Directory* tab.
Alt + 3	Click on *Speed Dials Directory* tab.
Alt + 5	Click on *LDAP Directory* tab.
Alt + 5	Click on *Outlook Directory* tab.
ALT-M	Click on *Monitoring* tab.
ALT-D	Click on *Dashboard* tab.

Control Keys	
ENTER	Click **Dial**.
<NumPad+>	Click **Transfer**.
<NumPad.>	Click **End**.
F1…F10	Click **Answer** after selecting a call in a queue, or double-click an active call.
F1…F10	Click **Hold** after selecting a call in the queue, or double-click an active call in the *Queue* panel.
F1…F10	Click **Unhold** after selecting a call in the queue, or double-click an active call in the *Queue* panel.
Ctrl + <Number Pad +>	Click **Conference**.
Ctrl + Alt + <Number Pad +>	Click **Conference Hold/Conference Unhold**.
Ctrl + Alt + Shift + <Number Pad +>	Click **Leave Conference**.
Ctrl + Shift + <Number Pad +>	Click **End Conference**.